FSA Modernization Partner Program
Monthly Management Services Summary
For the Month of June 2002

July 10, 2002

81.1.3g - PROGRAM MANAGEMENT SERVICES SUMMARY

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I. INTRODUCTION

This report covers the month of June 2002 and includes the following:

- Information on overall project completions/implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between FSA and Modernization Partner executives to improve the information provided to FSA Executives. We will continue to refine these monthly summaries to improve their usefulness and value. Please provide any suggestions regarding these reports to the FSA Modernization Partner Program Manager (eric.l.stackman@accenture.com or 202-962-0624).

II. PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD

This section reports on the completion or implementation of Modernization Partner projects.

CIO
- Completed the transition of IFAP/Schools Portal Operations to INDUS Corporation, effective July 1, 2002.

FINANCIAL PARTNERS
- Released the Lender Application Process (LAP) module to the community on June 3, 2002. There were 214 applications received through the LAP module as of June 18, 2002. LaRS testing began on June 7, 2002 and is progressing on schedule.
- Completed the FP Data Mart Production Readiness Review (PRR) successfully on June 17, 2002 and deployed Release 2 on June 19, 2002.

STUDENTS
- Began marketing of eServicing electronic bill presentment and payment products to Direct Loan borrowers. Sent email solicitations to 20,000 borrowers and implemented advertising on the Direct Loan web site.
- Deployed Release 1 "One Number for Students" (Pilot – 10% call volume for 2 weeks) to the production environment on June 29, 2002. This pilot begins deployment of the capabilities needed to satisfy FSA's "One Number for Students" objective from the FY02 Performance Plan.

III.   VALUE POINTS

This section reports value delivered above and beyond anticipated activities.

STUDENTS

- Held the first Consistent Answers Transformation working group meeting with Mod Partner and FSA.

WORKFORCE ALIGNMENT

- Facilitated & participated in HR Director's meeting with CFO to present the CFO's "Revitalization Plan."
- Developed new performance planning approach for creating Division Performance Objective, Division Director Performance Standards and job aids to support managers in cascading these objectives down to the employee level when developing job specific standards in the Department of Education's GPAS individual performance plan.
- Facilitated a dialogue between FSA HR and Students regarding the Collections area to discuss business needs and potential organizational implications.
- PAD Support team drafted a program management best practices report.
- PAD Support team identified how best practices will be measured and their connection to FSA's business practices.

IV.   MAJOR PROJECT MILESTONES ACHIEVED

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis. These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

CFO
- Completed NSLDS's RFP for data warehouse database selection, received proposals from IBM and Teradata, and began evaluation of proposals.
- Completed cross-channel walkthroughs of 7 of the 10 major functions that are part of the NSLDS II design with members of the IPT.

CIO
- Completed the Phase 1 pilot of the Enterprise Change Management (ECM) tool for Modernization efforts on May 16, 2002. The Executive Steering Committee approved the rollout of the ECM tool out to Modernization Partner teams, which started on June 17, 2002 and is on schedule for completion in August.
- Completed DLSS performance testing by the Integrated Technical Architecture (ITA) team.
- Installed and configured application components for FAFSA, by the ITA team.
- The Enterprise Application Integration (EAI) team provided support to Common Origination & Disbursement (COD) Release 1.1 for school testing, user acceptance testing and inter-system testing.
- Deployed to production the EAI interfaces for Financial Partners Data Mart.

SCHOOLS
- Rolled out the SAIG dashboard to eCDR and LaRS application teams.
- Completed COD's eight-weeks of production for Release 1.0 and continued with Post Implementation Verification (PIV) for Front End, FMS, DLSS and Web. PIV is 69% complete.
- COD Release 1.1 was partially implemented on June 3, 2002 after the Production Readiness Review conducted on May 31, 2002. Post Implementation Verification (PIV) for Release 1.1 is 24% complete. Most of the remaining functionality for Release 1.1 has been tested and deployed over the last weeks. Pending functionality for Release 1.1 will be deployed during the next several weeks.
- Began Requirements gathering effort for next year's COD release 2003-2004 (Release 2.0). Held four general meetings with all COD partners during the months of May and June.

STUDENTS
- Completed negotiations with FSA on the Consistent Answers SIS Deal and reached agreement in principle on the price and terms of the deal.
- Completed and delivered the formal Consistent Answers Technical and Price Proposals to FSA.
- Developed and delivered Consistent Answers Release 1 Deployment Communication to FSA Senior Leadership.

WORKFORCE ALIGNMENT
- Delivered a Human Capital Operating Model, which included the design and concept of the operating model for a Human Capital strategy for the enterprise.

V.   RISKS AND ISSUES

This section reports the issues and risks that are currently causing or could potentially cause a very significant impact on the Modernization Partner Program's goals.

Area	Consistent Answers for Customers (CRM 4FSA)
Description	As we move to design and build the target customer service delivery model for FSA, we need to ensure that we align the various release approaches and requirements with other modernization partner initiatives and operating partners, such that each understands its role in helping FSA and Mod Partner achieve the target customer service delivery model.
Impact	Failure to coordinate with other modernization partner initiatives and the operating partners during requirements and design will negatively impact the enterprise solution and implementation of the target customer service delivery model, and ultimately delay the realization of the savings as outlined in the business case.
Assistance Requested from FSA	We continue to work with leaders in the Students and Schools Channel to ensure that we have the support of other Modernization initiatives and Operating Partners as we proceed with the Consistent Answers project.
Proposed Solution/ Mitigation Strategy	We have developed a transformation/journey management road map outlining a release-by-release approach for coordination with other Modernization initiatives. External facilitators with prior experience with FSA and the Operating Partners have been engaged to help us work effectively with the Operating Partners.
Progress/ Resolution	During the month of June, the team defined the role of an enterprise-wide transformation working group, defined potential working group membership and completed the transformation work plan. The team continues to work with operating partners and has held numerous meetings with them to validate business requirements and designs.

Area	NSLDS Reengineering
Description	**Engaging Executives and NSLDS Users Outside of FSA** – There has been 3+ week delay in meeting with executives and users from ED, other agencies, schools and FP's because of delays in gaining internal FSA consensus which has been compounded by delays in proceeding with ED awareness.
Impact	2 - 3 week delay in the completion of the Definition Phase – beyond the original target completion date of June 30, 2002, now extended to July 19, 2002.
Assistance Requested from FSA	Move much more aggressively to engage ED, other agencies, schools and FPs – both executives and users.
Proposed Solution/ Mitigation Strategy	Identify most critical contacts at other agencies and in the community who can provide a representative picture of the non-FSA NSLDS requirements (week of 6/3) and move quickly to contact these individuals and confirm their requirements (beginning week of 6/10)
Progress/ Resolution	Meetings have been conducted with key stakeholders and NSLDS users from ED and other agencies. Selected users from schools and FP's still need to be engaged to confirm their requirements.

Area	FARS Retirement
Description	Share in savings (SIS) deal needs to be reopened - savings have not started, which causes targets not to be met due to schedule delays in retiring FARS. FSA plans to lengthen operational support of the Credit Management data mart (CMDM). FARS Retirement scheduled per June 28, 2002 meeting.
Impact	• Schedule delays in retiring FARS and the mainframe will reduce the overall savings • Lengthening the operational support will increase project costs
Assistance Requested from FSA	• Continue support from CFO Accounting to reconcile and close each month on FMS as quickly as possible • Continue to complete FARS/mainframe retirement tasks as quickly as possible once a decision is made • Define ongoing support needs of the CMDM
Proposed Solution/ Mitigation Strategy	• Working with FSA CFO to determine FMS reconciliation and closing schedule • Retirement criteria must be clearly defined • Existing support team can be extended until December if needed • Schedule a meeting to discuss deal modifications needed to address additional operations support and delays.
Progress/ Resolution	• FMS and CMDM are tracking to joint schedule in order to expedite satisfying retirement criteria • Accounting division focused on required reconciliation effort • Mod Partner quantifying impact to SIS deal to facilitate negotiations

Area	CIO Tech Arch- EAI
Description	DLSS is unable to communicate with the EAI Bus via MQSeries (EAI Messaging Product). The DLSS OpenVMS system returns TCP/IP errors when the MQSeries listener attempts to start.
Impact	MQSeries channels between the OpenVMS system and bus servers are unable to communicate, thus data transfer via MQSeries is disabled.
Assistance Requested from FSA	N/A.
Proposed Solution/ Mitigation Strategy	Currently we are manually FTP'ing files between DLSS and the DLSS Trading Partner Systems. This is not a long-term solution.
Progress/ Resolution	Multiple conference calls between IBM and HP have taken place. IBM has provided HP with MQSeries code for troubleshooting purposes. At this point in time, HP cannot tell us why we are receiving the TCP/IP error. An update regarding the issue was requested from HP on July 1, 2002.

VI. TASK ORDER STATUS REPORT SUMMARY

This section presents an extract of all "Red" assessed criteria. The extract is taken from the Bi-Weekly Task Order Status Reports. (See Appendix VII for the more information on the Bi-Weekly Task Order Status Reports.)

Task Order	Assessment Criteria	Assessment	Comments
TO 94 – NSLDS Reengineering	Red	Overall	Continued meeting with key stakeholders from ED and other agencies. Continued cross-channel walkthroughs of major system capabilities. Engaged Raytheon (after a 2+ month delay) and MicroStrategy.